

FACTSHEET – POLICIES AND PROCEDURES

What are policies?

Policy documents are there to explain how your organisation intends to conduct its services, activities or business. They are there to help with decision making, support good practice and ensure your organisation complies with the law.

What are procedures?

Procedures describe how your policies will be put into practice. Each procedure should specifically outline who does what and the steps they need to take. They will help you to comply with legislation, provide appropriate controls, provide evidence of accountability and help to manage risk.

Why are they important?

Policies and procedures help organisations to:

- Provide clarity in how they do things and what is expected of staff and volunteers
- Comply with the law
- Be transparent and accountable
- Manage and limit risk

Core Policies and Procedures

Every organisation will have different policies and procedures which are relevant to their values and activities and the level of detail needed will also vary. However, every organisation should have policies and procedures for the following as a minimum:

- Safeguarding policy (if you work with children and young people and/or vulnerable adults)
- Health and safety policy
- Equality, diversity and inclusion policy
- Finance and expenses policy
- Data protection policy
- Sickness absence policy and procedure
- Annual leave procedure or arrangements
- Grievance and disciplinary procedure
- Code of conduct



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Other Policies and Procedures

There are numerous other areas where it is common for organisations to have written policies and procedures and it is for the board to decide which are required. For example:

- Customer care
- Consultation and engagement
- Flexible working
- Harassment or bullying
- Insurance
- Maternity and paternity
- Procurement
- Quality assurance
- Redundancy
- Social media
- Supervision and appraisal
- Training and development
- Whistleblowing
- Volunteers

Keeping policies and procedures up to date

Policies and procedures should be relevant and regularly updated, not forgotten about on a shelf. Safeguarding, health and safety and finance policies should be updated annually to ensure they are current and compliant with the law.

Less critical policies may be reviewed every 2-3 years, however any legal or regulatory changes should trigger a review of any relevant policies.

It is good practice to maintain a register of all your policies clearly showing:

- What individual policies you have
- When they were each last dated
- The next review date for each policy

To read more about developing policies and procedures, NCVO have some helpful information which you can view by [following this link](#)

For further information, templates and support developing your policies please contact fundinganddevelopment@buryvcfa.org.uk



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